# Guide

## for Private School Planning and Results Reporting

April 2001

Alberta

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# I. Introduction

This guide has been developed to assist Alberta's private school authorities in preparing, updating and reporting on their three-year education plans. This guide applies only to funded, accredited private schools that provide a complete elementary, junior high and/or senior high school program. Throughout the document, the term 'private school' is used to mean 'private school authority'.

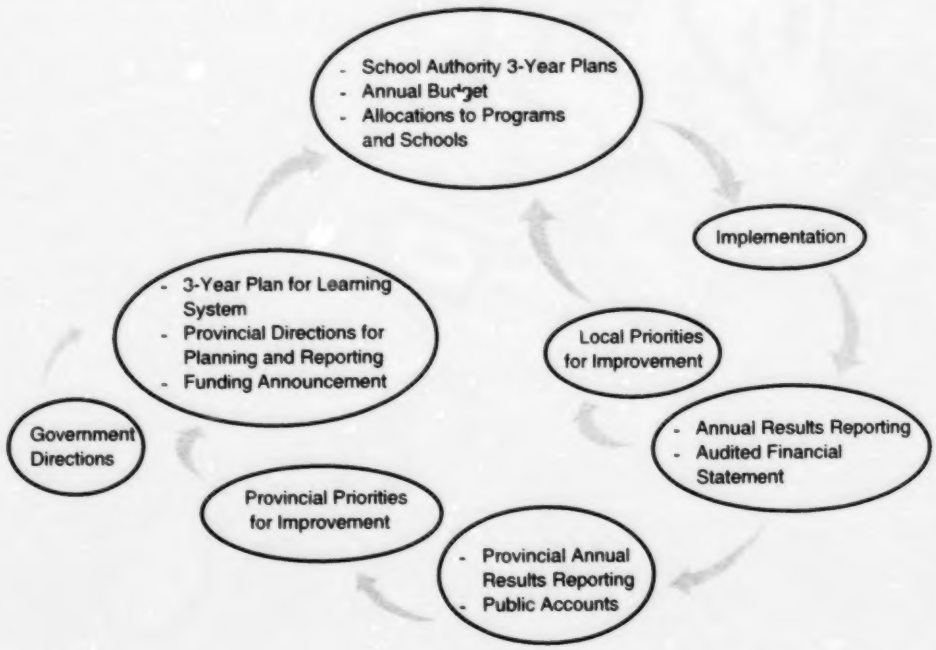
While previous editions of the guide have focused on year-to-year changes and requirements, this new guide has separated general information for long-term use from requirements. The general information is provided in Sections I to IV. Links are provided to specific provincial requirements in Section V. These are reviewed each year. Related reference materials are in the Appendix, Section VI.

# II. Planning and Reporting Overview

Planning and reporting by private schools throughout Alberta are carried out within government's Accountability Framework. This framework is an ongoing cycle that enables continuous improvement and critical reflection by:

- measuring progress, setting priorities and using results to continually improve education for students;
- incorporating provincial direction and community input; and
- communicating with stakeholders (provincial government, staff, parents, the school community) about the school's directions and results.

**Accountability Framework for Continuous Improvement – Basic Learning System**


- School Authority 3-Year Plans
- Annual Budget
- Allocations to Programs and Schools
Implementation
- Annual Results Reporting
- Audited Financial Statement
Local Priorities for Improvement
- 3-Year Plan for Learning System
- Provincial Directions for Planning and Reporting
- Funding Announcement
Government Directions
Provincial Priorities for Improvement
- Provincial Annual Results Reporting
- Public Accounts

Each level in the Accountability Framework plays a key role.

Government of Alberta – sets overall provincial direction and allocates budget for ministries; monitors and reports on progress, and uses results to plan improvements.

Alberta Learning – prepares Ministry three-year business plan and guidelines for learning system plans based on provincial direction, reports annually on results and uses results to plan improvements, identifies provincial priorities for improvement, allocates funds to school authorities and post-secondary institutions, defines basic education, reviews school authority and post-secondary institution plans and results to identify implications for provincial level planning.

Private school authorities – plan and implement three-year education plans aligned with ministry direction and school authority focus and purpose; allocate resources to programs; monitor progress; report annually to stakeholders and use results to plan improvements.

References:

- Legislative Authority, Appendix 1
- Definition of Basic Education (Ministerial Order No. 004/98), Appendix 2
- Alberta Learning's Three-Year Business Plan for 2001/02 to 2003/04 will be available on the Ministry's website upon release.

# III. Private School Planning

Private schools build and maintain plans on a three-year timeframe. They update plans annually so that as one year is completed and another is added, the plan continues to roll forward. The updating responds to recent performance results and changes in the operating environment. Although entirely new plans are rarely prepared, private schools update some components of their plan on an annual basis, such as strategies and priorities. Every few years, they revisit and refresh their vision, mission and beliefs.

### Preparing and Updating Plans

Private schools annually update three-year education plans based on the principle of continuous improvement and take into account a number of considerations, including:

- private school results;
- input from stakeholders such as parent organizations, parents and the school community;
- resources available;
- Alberta Learning three-year plan and annual results; and
- feedback from Alberta Learning.

Private school three-year plans build on Alberta Learning's vision, mission and goals for lifelong learning. Private schools adapt goals and outcomes **required** by the province and incorporate local goals and outcomes to reflect their unique characteristics and circumstances.

### Communication

Private school three-year education plans can serve as a valuable tool for communicating with staff, parents and other key community groups. Private school plans **must** be kept on file and be available for review by parents and key community groups. As well, Ministry staff review private school plans during regularly scheduled on-site reviews to ensure alignment with provincial goals and to provide input into provincial-level planning for the learning system.

**Publication and notification requirements for private schools, Link 1**

## Elements of Education Plans

Each private school's three-year education plan is built on a three-year timeframe and includes a number of elements, some of which are **required** by Alberta Learning.

Foundation statements, such as vision, mission, principles and/or beliefs articulate the private school's purpose. Contextual information such as a school profile or issues and trends describe the planning environment. Alberta Learning **requires** that education plans include specific provincial priority areas for improvement along with a rationale, as well as goals and related outcomes, performance measures, targets and strategies. As well, Alberta Learning **requires** evidence of integrated planning in the form of highlights of specific related plans such as financial plans in addition to intended use of targeted provincial funding.

These elements of education planning, described briefly below, combine to form an education plan that shows stakeholders where the private school is going, how it plans to get there, how it will measure progress and what resources it will use along the way. The plan acknowledges the private school's role in Alberta's learning system, adapted to the context of the private school. Required elements are labeled.

### *Foundation Statements*

#### Vision

A vision looks to the future. It describes a set of ideal circumstances that private schools strive to achieve. These ideals focus on student achievements and the programs or services that maximize student accomplishments.

Private schools reflect Alberta Learning's vision for the provincial learning system - Optimizing human potential - through their vision statements.

#### Mission

A mission statement is a clear, concise description of the private school's overall purpose and role. It gives direction to the programs and services that a private school provides for its students. A private school's mission is consistent with Alberta Learning's mission:

> Alberta Learning's leadership and work with partners builds a globally recognized lifelong learning community that enables Albertans to be responsible, caring, creative, self-reliant and contributing members of a knowledge-based and prosperous society.

#### Principles and/or Beliefs

Alberta Learning has established principles for the learning system: learner-centred, accessible, collaborative, accountable, responsive, innovative and equitable. These would be reflected in the private school's statements as well as their own organizational

beliefs. The private school's principles or beliefs statements guide decision-making and provide a foundation for developing its mission, vision and goals.

## *Contextual Information*

### Profile

A profile is a brief description of the private school that gives context for the plan. Profiles describe characteristics of the school community, students, programs and locations.

### Issues and Trends

Issues and trends help private schools identify opportunities and challenges that may impact planning, budgeting or assessing and reporting results. An issue is a condition that may affect the school's ability to fulfill its mandate or to achieve its goals. A trend shows a direction of results over time.

### Priority Areas for improvement [required]

Priority areas for improvement reflect local and province-wide priorities that require immediate, concerted attention. Reviewing annual performance results is an important basis for selecting priorities in areas where results do not meet expectations. Selecting and addressing priorities for improvement are essential aspects of the accountability cycle for continuous improvement in Alberta's basic learning system.

**Required Provincial Priorities for Improvement, Link 2**

## *Goals and Related Components*

### Goals [required]

Goals are broad statements that look towards the long term and steer organizations in the direction of realizing their vision. They are often expressed as desired conditions or aims. Private school goals reflect Alberta Learning's goals that guide the direction of the learning system overall as well as address local needs and circumstances.

### Outcomes [required]

Outcomes are measurable statements of what the private schools seek to achieve. In broad terms, they answer the question: "What will this look like when we get to where we want to be?" Additional outcomes focus on local needs and circumstance. Each goal **requires** at least one outcome.

**Required Goals and Outcomes for Private School Plans, Link 3**

### Performance Measures and Targets [required]

Performance measures are the assessment tools that private schools use to track how far along they are in achieving the outcomes in their plan. Education plans include at least one measure for each outcome; conversely, one measure can address more than one outcome. Measures can be quantitative or qualitative. Quantitative measures are expressed in "numbers of" or "percentages of".

Private schools list in their plans the measures they will use to assess and report their results, as well as past results for these measures, if available. These measures include the **required** provincial measures, locally-determined measures for provincial and private school priorities for improvement, and any other local measures. The provincial measures for the provincial priorities for improvement are provided as examples for private schools.

**Provincial Measures and Results for Priority Areas for Improvement, Appendix 3**

Targets are strategic tools to help private schools focus on maintaining or improving results. Targets show desired levels of performance to be attained by a certain time. Targets are **required** for the provincial student achievement measures.

**Requirements for Performance Measures and Targets, Link 4**

### References

**Performance Measurement, Appendix 4**

**Setting Local Targets for Student Achievement, Appendix 5**

**Conducting Surveys, Appendix 6**

### Strategies [required]

Strategies are actions that private schools take to achieve goals and desired outcomes. Private schools are **required** to develop strategies for each goal to achieve outcomes, to address provincial and local priorities for improvement, to reflect use of targeted funding (e.g., Early Literacy, students with special needs, Student Health, Alberta Initiative for School Improvement), and to deal with local issues, trends and opportunities.

## *Highlights of Integrated Planning*

Private school planning in specific areas, such as financial plans, use of targeted provincial funding, technology plans, facilities plans, teacher/staff in-service plans contribute to improving student results and are related to achieving the three-year education plan.

## Highlights of Related Plans and Targeted Funding [required]

In this section of the education plan, private school authorities highlight for their stakeholders the focus, rationale and intended results for students in each of the next three years of their related plans for use of targeted provincial funding, including how these specific plans support their education plan.

**Requirements for highlights of related plans and targeted funding, Link 5**

## Budget Highlights [required]

Budget highlights present summarized information from the private school's budget for the first year of the three-year plan in easy-to-understand terms for parents and the school community. These highlights indicate how the budget supports the plan and how the school allocates resources, e.g., administration, instruction, operations, maintenance and capital. Private schools also include information on how detailed budget information can be obtained.

# IV. Private School Reporting

Private schools report annually on their progress and achievements and use the information to identify improvements to address in their updated plan. Every few years private school authorities may wish to undertake a major retrospective by assessing accomplishments over a longer span of time, e.g., in preparation for a major direction-setting exercise.

## Results Reporting

Each year private schools report on the progress and results of their three-year education plans through an Annual Education Results Report (AERR). The results are a primary tool that authorities use to continually improve education for their students. The results provide information on areas where performance is strong and identify areas that need improvement. In short, it allows private schools to practice results-based decision-making.

The annual results report also tells stakeholders where the private school is in relation to where it wants to be. It demonstrates that the school is accountable for student achievement and for the wise use of resources to provide quality programs for students and to address improvement priorities.

### Communication

AERRs provide private schools with the opportunity to highlight their accomplishments in addition to including the **required** reporting and analysis of performance measures. AERRs are public documents available to parents, other members of the community and Ministry staff upon request. Private schools also communicate results to their community through newsletters, brochures, etc.

**Publication and notification requirements, Link 1**

Alberta Learning staff review private school AERRs during scheduled on-site reviews to ensure alignment with provincial goals and to provide input into provincial-level planning for the learning system.

## Elements of Annual Education Results Reports

Listed below are the elements typically found in a school board AERR. Those elements required by Alberta Learning are labeled.

### Highlights of Education Plan Accomplishments

This section of the Annual Education Results Report (AERR) gives private schools the opportunity to provide descriptive information about their progress and accomplishments in implementing their three-year education plan. It highlights the school's accomplishments during the past year, such as the introduction of new program for students. Private schools also can include descriptions of student and community characteristics as well as circumstances affecting operations and results.

### Performance Measures Results [required]

In this section private schools provide results information for the performance measures in the school three-year plan for the **required** student achievement measures and local measures, including those selected to assess provincial priorities for improvement. School authorities use the results to analyze and assess their progress. Contextual information can be provided to explain results and describe the environment in which results were achieved. This qualitative information enhances understanding of quantitative results and contributes to the overall assessment of progress and achievement.

**Requirements for reporting on student achievement, Link 6**

Provincial results on measures related to the provincial priorities for improvement are provided in Appendix 3 as examples for private schools. If authorities use corresponding local measures, they can report their performance in relation to the provincial results.

**Provincial results for priorities for improvement, Appendix 3**

### Future Challenges [required]

This section of the AERR describes major issues, concerns and priorities for the private school for the next few years, including priorities for improvement identified from the assessment of results. It also discusses emerging issues and trends that have implications for the school.

## Highlights of Related Plans and Targeted Funding [required]

Implementation of related private school plans such as human resource, capital, financial and technology plans during the school year contribute to the overall achievement of the education plan, as does the school's use of targeted provincial funding. In this section of the AERR, private schools highlight progress on or results achieved for these related plans over the past year and briefly explain how these have supported or enhanced learning for students.

**Requirements for Highlights of Related Plans and Targeted Provincial Funding, Link 7**

## Financial Summary [required]

In the financial summary, private schools provide a brief overview of their spending for the previous year based on the Audited Financial Statement (AFS), including spending per student per year in total and by program area, as outlined in Schedule A of the AFS. This information is presented clearly and concisely in a table or graph format for the primary audience - parents and other members of the community. Private schools also indicate how readers can access detailed expenditure information.

# V. Links

## Link 1
## Publication and Notification Requirements

Three-year education plans and Annual Education Results Reports are public documents, approved by the private school authority, which are available for public review.

### Education Plans

Three-year plans are updated by May 31 of each year. Private schools indicate their plan is updated and meets provincial requirements on the Three-Year Education Plan Declaration Form. The Declaration Form is submitted to Alberta Learning as part of the Annual Operation Plan.

Private schools are also **required** to ensure the complete three-year education plan and the Budget Report for the first year of the plan are on file and available to the public and Ministry staff upon request.

### Results Reports

The Annual Education Results Report (AERR) is prepared by November 30 of each year. Each private school submits an Annual Education Results Report Summary Form to Alberta Learning by November 30. This form is designed to collect selected outcomes information achieved by funded private schools on the required measures.

Private schools are also **required** to ensure the complete AERR and the Audited Financial Statement are on file and available to the public and Ministry staff upon request.

## Link 2
## Required Provincial Priority Areas for Improvement, 2001/02 to 2003/04

Priorities for improvement are important outcomes where performance does not meet expectations. Private schools develop strategies for their plan to address provincial and local priorities for improvement based on their results. Listed below are the **required** provincial priorities for improvement for the basic learning system related to provincial goals and outcomes. Private schools can address the priorities that relate to more than one goal or outcome with measures and strategies in whichever of the goals and outcomes they determine is most appropriate. Provincial results for measures related to priorities for improvement are provided as examples in Appendix 3.

### Priority Areas for Improvement and Related Goals

- **Improving community satisfaction with education**
  Related to all Goals and Outcomes

- **Improving coordination of services for children**
  Related to Goal One - High Quality Learning Opportunities
  Outcomes: The learning system is responsive - the learning system meets the needs of all learners and society.
  The learning system is flexible and provides a variety of programs and modes of delivery.
  The learning system is accessible - all Alberta students can participate in learning.

  Related to Goal Four - Effective Working Relationships with Partners
  Outcomes: Effective partnerships meet the learning needs of Albertans.
  Joint Initiatives contribute to the achievement of the social and economic goals of the province.

- **Increasing high school completion rates**
  Related to Goal Two - Excellence in Learner Achievement
  Outcome: Learners complete programs.

- **Improving secondary student achievement in mathematics**
  Related to Goal Two - Excellence in Learner Achievement
  Outcome: Learners demonstrate high standards.

- **Improving access to information technology**
  Related to Goal One - High Quality Learning Opportunities
  Outcome: The learning system is flexible and provides a variety of programs and modes of delivery.

  Related to Goal Three - Well Prepared Learners for Lifelong Learning, World of Work and Citizenship
  Outcomes: Albertans are able to learn continuously.
  Learners are prepared for work.

## Link 3
## Required Goals and Outcomes for Private School Plans 2001/02 to 2003/04

Listed below are the learning system goals and outcomes that are **required** to be incorporated in school authority three-year plans. The learning system outcomes, which apply across the entire learning system may be interpreted, and contextualized, by private schools to reflect their ECS-12 mandate, local needs and circumstances. For example, the applicable private school outcome statement for "learners complete programs" could be restated as "students complete high school" or "students are prepared to be successful in the next grade". These goals and outcomes are reviewed annually in the Ministry's business planning process.

| Goals | | Learning System Outcomes |
|---|---|---|
| Goal 1: | High Quality Learning Opportunities* | • The learning system is responsive - the learning system meets the needs of all learners and society.<br>• The learning system is flexible and provides a variety of programs and modes of delivery.<br>• The learning system is accessible - all Alberta students can participate in learning.<br>• Financial need is not a barrier to learners participating in learning opportunities.<br>• The learning system is affordable. |
| Goal 2: | Excellence in Learner Achievement | • Learners demonstrate high standards.<br>• Learners complete programs. |
| Goal 3: | Well Prepared Learners for Lifelong Learning, World of Work and Citizenship | • Children start school ready to learn.<br>• Albertans are able to learn continuously in school, at work and in society.<br>• Learners are well prepared for work.<br>• Learners are well prepared for citizenship. |
| Goal 4: | Effective Working Relationships with Partners | • Effective partnerships meet the learning needs of Albertans.<br>• Joint initiatives contribute to the social and economic goals** of the province. |

* Private schools may choose to add to this goal an outcome and corresponding measure(s) and strategy(ies) relating to high quality teaching.

** Selected Social Goals: Our children will be well cared for, safe, successful at learning and healthy; Alberta students will excel.

Selected Economic Goals: Alberta will have a prosperous economy; Our workforce will be skilled and productive; Alberta businesses will be increasingly innovative.

## Link 4
## Requirements for Student Achievement Performance Measures and Targets for Private School Plans, 2001/02 to 2003/04

The **required** performance measures and targets listed below are to be included in private school three-year plans along with results for the past five years, if available. These measures relate to the outcome "Learners demonstrate high standards" for the goal - Excellence in Learner Achievement - in private school plans. Three-year targets are **required** for two of the measures below: provincial achievement tests (item 1) and diploma exams (item 5).

1. Percentages of students (excluding those in home education programs) who achieve the acceptable standard and the standard of excellence on provincial achievement tests in Grades 3, 6 and 9 (five years of results), based both on those writing and the cohort (total enrollment in grade) in relation to provincial results, provincial standards* and targets private school authorities set for the end of the plan period, 2003/04.**

2. Performance of students in a home education program in Grades 3, 6 and 9 in mathematics and language arts, both for those writing and those not writing provincial achievement tests.

3. Performance of students who are absent from the grades 3, 6, and 9 provincial achievement tests (measure being piloted in June 2001 for implementation in June 2002).

4. Performance of students in the Integrated Occupational Program (measure being piloted in June 2001 for implementation in June 2002).

5. Percentages of students who achieve the acceptable standard and percentages who achieve the standard of excellence on diploma examinations. (The five-year diploma exam trend data for private schools should be based on the difference between the school authority and provincial results relative to the three-year targets private schools set for the end of the plan period, 2003/04.** Results for Applied Math 30 and Mathematics 33 are excluded for 2001/02, and this is the first year to report results for Pure Math 30.)

6. Student participation in diploma exam courses.

The Learner Assessment Branch provides school authorities with multi-year reports on student results and participation on provincial achievement tests and diploma examinations. Private schools include this information in their plans and use it for setting one-year (optional) and three-year **(required)** targets for these measures.

* Provincial standards: 85% of students writing are expected to achieve the acceptable standard and 15% are expected to achieve the standard of excellence.

** Setting one-year targets is optional.

## Link 5
## Requirements for Highlights of Related Plans and Targeted Funding

Private school plans in specific areas are integral to the achievement of their three-year plans, as are their plans for using provincial funds provided for specific purposes.

In this section, private schools highlight the focus, rationale and intended results for students in each of the next three years, of the following targeted provincial funding:

- Early Literacy (ELI)
- Students with Special Needs
- Student Health
- Alberta Initiative for School Improvement (AISI)

Private schools also may highlight the purpose and intended results of other related plans, such as:

- capital plan
- technology plan
- teacher in-service/professional growth plan
- transportation plan
- other plans

## Link 6
## Requirements for Private School Reporting on Student Achievement, for November 2002 AERR

Listed below are the performance measures **required** to be reported in Private school Annual Education Results Reports. They provide information related to the outcome "students achieve high standards" for the goal Excellence in Learner Achievement in the school's three-year plan.

- Percentages of students (excluding those in home education programs) who achieved the acceptable standard and percentages of students who achieved the standard of excellence on provincial achievement tests in grades 3, 6 and 9 (five years of results) based both on those writing and the cohort (total enrollment in grade) in relation to private school targets for 2001/02 set in the three-year education plan for 1999/2000 – 2001/02, provincial results and provincial standards*.

- Performance of students in a home education program in grades 3, 6 and 9 language arts and mathematics for both those who wrote provincial achievement tests and those who did not write.

- Performance of students who were absent from the grades 3, 6 and 9 provincial achievement tests (measure being piloted in June 2001 for implementation in June 2002).

- Performance of students in the Integrated Occupational Program (this measure is being piloted in June 2001 for implementation in June 2002).

- Percentages of students who achieved the acceptable standard and percentages who achieved the standard of excellence on diploma examinations. (The five-year diploma exam trend data for private schools should be based on the difference between the school authority and provincial results relative to the three-year targets private schools set for 2001/02 in the three-year plan for 1999/2000-2001/02. Results for Applied Math 30, Mathematics 33 are excluded for 2001/02 and this is the first year to report results for Pure Math 30.)

- Student participation in diploma examination courses.

The Learner Assessment Branch provides multi-year reports by private school authority on student achievement and participation on provincial achievement tests and diploma examinations. This information can be used to report to the public on the above measures.

* Provincial standards: 85% of students who wrote are expected to achieve the acceptable standard, and 15% are expected to achieve the standard of excellence.

## Link 7
## Highlights of Accomplishments - Related Plans and Targeted Funding

Implementation of private school plans in specific areas and use of provincial funds provided for specific purposes contribute to the achievement of the three-year education plan.

In this section of the AERR, private schools highlight their progress and results over the past year, including how student learning has been enhanced with the following targeted provincial funding:

- Early Literacy (ELI)
- Students with Special Needs
- Student Health
- Alberta Initiative for School Improvement (AISI)

Private schools also may highlight progress and results of their:

- capital plans
- technology plans
- teacher growth/in-service plans
- other plans (e.g., human resources, transportation)

# VI. Appendix 1
## Legislative Authority

The provincial government has developed a comprehensive concept of accountability which expanded the focus from accounting for dollars spent to include accounting for results achieved. Accountability for performance involves developing plans to make best use of resources available, assessing results to determine if expectations are being met, identifying and addressing areas where improvement is needed, and reporting the results to the public.

This expanded concept of accountability, applying to government departments and funded agencies and organizations, was established in legislation in 1995. The Government Accountability Act (GAA) requires government departments and school boards as well as other public agencies to prepare plans and report on results.

The accountability cycle for the basic learning system (*Accountability in Education – Policy Framework,* June 1995) was developed to describe the application of government's comprehensive concept of accountability to the ECS-12 system. This cycle focuses on continuous improvement and on the linkage of school authority plans and reports to each other and to provincial directions for the learning system, as reflected in the School Authority Accountability Policy, 2.1.1 (*Policy, Regulations and Forms Manual*, on-line at www.learning.gov.ab.ca).

A variety of documents essential for school system operations are available on the department's website, such as the three-year business plan for the learning system, the Guide to Education, the Program of Studies and the Funding Manual. The Government Accountability Act and the School Act are available on the Queen's Printer website linked from the on-line Policy Manual Table of Contents, or at www.gov.ab.ca/qp/

Alberta Learning's website also provides information to enhance authority planning and reporting, such as the provincial surveys of parents, high school students and the public, and the summaries of the reviews of school board plans and AERRs.

## Appendix 2
## Basic Education in Alberta – The Definition

### Ministerial Order No. 004/98

[Note: The Ministerial Order below contains the updated requirements for Basic Education referred to in Procedures 2 of the Private School Policy, 3.6.1 in the Policy, Regulations and Forms Manual, on-line at www.learning.gov.ab.ca. This Ministerial Order applies to funded, accredited private schools that offer a complete elementary, junior high and/or senior high school program. The Education Delivery section (next page) does not apply to home education programs.]

A basic education must provide students with a solid core program including language arts, mathematics, science and social studies. Students will be able to meet the provincial graduation requirements and be prepared for entry into the workplace or post-secondary studies. Students will understand personal and community values and the rights and responsibilities of citizenship. Students will develop the capacity to pursue learning throughout their lives. Students also should have opportunities to learn languages other than English and to attain levels of proficiency and cultural awareness which will help to prepare them for participation in the global economy.

### Student Learning Outcomes

Students are expected to develop the knowledge, skills and attitudes that will prepare them for life after high school. A basic education will allow students to:

- Read for information, understanding and enjoyment.
- Write and speak clearly, accurately and appropriately for the context.
- Use mathematics to solve problems in business, science and daily-life situations.
- Understand the physical world, ecology and the diversity of life.
- Understand the scientific method, the nature of science and technology, and their application to daily life.
- Know the history and geography of Canada and have a general understanding of world history and geography.
- Understand Canada's political, social, and economic systems within a global context.
- Respect the cultural diversity and common values of Canada.
- Demonstrate desirable personal characteristics such as respect, responsibility, fairness, honesty, caring, loyalty, and commitment to democratic ideals.
- Recognize the importance of personal well-being and appreciate how family and others contribute to that well-being.
- Know the basic requirements of an active, healthful lifestyle.
- Understand and appreciate literature, the arts and the creative process.

- Research an issue thoroughly and evaluate the credibility and reliability of information sources.
- Demonstrate critical and creative thinking skills in problem solving and decision making.
- Demonstrate competence in using information technologies.
- Know how to learn and work independently and as part of a team.
- Manage time and other resources needed to complete a task.
- Demonstrate initiative, leadership, flexibility, and persistence.
- Evaluate their own endeavours and continually strive to improve.
- Have the desire and realize the need for life-long learning.

**Standards for Student Learning**

The Minister of Education defines acceptable standards and standards of excellence for student achievement in consultation with Albertans. Employers are involved in specifying the knowledge, skills and attitudes needed in the workplace. Schools, school authorities and the Minister of Education assess and report regularly to the public on a range of student learning.

The school's primary responsibility is to ensure that students meet or exceed the provincial standards as reflected in the Student Learning Outcomes (outlined above), the Alberta Programs of Study, provincial achievement tests, diploma examinations and graduation requirements.

**Education Delivery**

Schools must engage students in a variety of activities that enable them to acquire the expected learnings. Schools have authority to deploy resources and may use any instructional technique acceptable to the community as long as the standards are achieved. Schools, teachers and students are encouraged to take advantage of various delivery options including the use of technology, distance learning and the workplace.

Schools play a supportive role to families and the community in helping students develop desirable personal characteristics and the ability to make ethical decisions. Schools also help students take increasing responsibility for their learning and behaviour, develop a sense of community belonging and acquire a clearer understanding of community values and how these relate to personal values.

Students learn basic, transferable knowledge, skills and attitudes in school. Schools, in co-operation with employers, provide opportunities for students to develop and practice employability skills. The Minister of Education provides credit for off-campus learning that is approved and accepted by the school and the employer. Government works with schools, employers and post-secondary institutions to help young people make a smooth transition to work and further study.

# Appendix 3
# Provincial Results for Measures for the Provincial Priority Areas for Improvement

Listed below are the results for provincial performance measures related to the required provincial priority areas for improvement. These measures are provided as examples. School authorities identify appropriate measures for these priorities in their three-year plans. If the authority's measures correspond to the provincial measures, their results can also be reported in relation to provincial results in their plans and AERRs.

**Priority: Improving public satisfaction with education.**

- Percentage of the public satisfied with quality of education in schools.

| 1997/98 | 1998/99 | 1999/2000 | Target 2002/03 |
|---|---|---|---|
| 70% | 66% | 68% | 75% |

**Priority: Improving coordination of services for children with special needs.**

- Percentage of parents of children with severe special needs who are satisfied with services for their child.

| 1997/98 | 1998/99 | 1999/2000 |
|---|---|---|
| 79% | 78% | 76% |

**Priority: Increasing high school completion rates.**

- Percentage of students who completed high school within six years of entering Grade 9.

| 1995/96 | 1996/97 | 1997/98 | 1998/99 | 1999/2000 | Target 2002/03 |
|---|---|---|---|---|---|
| 69% | 69% | 70% | 70% | 71%* | 75% |

* preliminary

**Priority: Improving secondary student achievement in mathematics*.**

- Percentages of students who achieved the acceptable standard on the Grade 9 provincial achievement test in mathematics and the percentages who achieved the standard of excellence.

| | 1997/98 | 1998/99 | 1999/2000 | Standard |
|---|---|---|---|---|
| Results for students who wrote the test | | | | |
| - Acceptable | 72% | 72% | 74% | 85% |
| - Excellence | 14% | 15% | 16% | 15% |
| Results for all students in grade 9 | | | | |
| - Acceptable | 64% | 64% | 67% | -- |
| - Excellence | 13% | 14% | 14% | -- |

* With the phase-in of Pure Math 30 and Applied Math 30, comparable results for grade 12 students in prior years are not available.

**Priority: Improving students' access to information technology.**

- Percentage of students and parents who report school helps improve students' computing skills.

| | 1995/96 | 1996/97 | 1997/98 | 1998/99 | 1999/2000 |
|---|---|---|---|---|---|
| Students | 65% | 62% | 64% | 70% | 69% |
| Parents | -- | -- | 67% | 80% | 79% |

- Student/instructional computer ratio.

| 1997/98 | 1998/99 | 1999/2000 |
|---|---|---|
| 8.6 | 7.7* | 6.7* |

* preliminary

## Appendix 4
## Performance Measurement

Performance measures in education plans and results reports provide information on achievement of outcomes on key aspects of the education system. This information is an essential part of accountability that enables the school authority to:

- assess and report on progress, what's working well, what needs improvement
- determine priorities for improvement and set improvement targets
- make program and budget decisions to maintain good performance and improve performance in areas requiring improvement.

Measures typically provide quantifiable information on key aspects of education. This information is generated quantitatively through tests and data analysis or through qualitative means, such as observation, interviews, portfolio reviews. Whether quantitative or qualitative, measures demonstrate observable change.
To be meaningful, measures information is obtained regularly (e.g., annually) and is normally expressed in percentages, ratios, or numbers in relation to a total.

### Types of Performance Measures

- **Outcome measures:** provide information on progress toward desired results in key areas - effectiveness of programs, impacts on clients.

  The measures in school authority plans and results reports focus on outcomes and constitute the core set for assessing and reporting on progress and achievement.

  Other types of measures, listed below, are important for managing resources, providing programs and services and reporting contextual information:

- **Intermediate outcome measures**: For some desired outcomes, results may not be known for several years. In such instances, it is useful to measure intermediate steps – milestones or landmarks - toward the desired outcome.
- **Output measures**: information on number of clients served and types of services provided.
- **Process measures**: information on activity and efficiency. These measures indicate demand for services and cost per unit of providing service.
- **Input measures**: information on resources allocated to programs, such as funding, personnel, equipment. These measures provide information on cost of providing programs and services.

### Characteristics of good performance measures

Good performance measures provide information that is:

- Understandable – clear and sufficient to provide an understanding of the organization or system to staff, community and government

- Valid – meaningful and credible (sound, defensible)
- Relevant and appropriate – timely, related to important aspects
- Reliable – unbiased, error free and verifiable
- Comparable – show change over time and/or among similar organizations
- Discrete – provide information in distinct, non-overlapping categories
- Empowering – useful for decision making, promote improvement
- Practical – can be reliably assessed with reasonable effort

**References:**

Alberta Treasury, *Measuring Performance: A Reference Guide*, September 1996. On the internet at http://www.treas.gov.ab.ca. Click on Performance Measurement Home page.

Alberta Auditor General, *Government Accountability*, February, 1997. On the internet at http://www.oag.ab.ca/. Click on the Reading Room.

## Appendix 5
## Setting Local Targets for Student Achievement

### Targets and Planning

A target is a desired level of measurable or observable performance to be attained by a specified time. Targets are an implicit part of any goal. While a private school's educational goals point out the directions for people's efforts, targets describe in specific terms what results will be accomplished by a certain time. This allows staff to assess whether they are heading where they intended to go, and how well they are moving toward their desired outcomes. Assessment of progress in relation to a target may also lead to the recognition that a different target would be more helpful in guiding the school authority's efforts toward a particular goal. By identifying immediate, reachable outcomes, targets encourage teachers, students, administrators, and their community to believe that distant goals are attainable.

Viewed in this way, targets can be a valuable part of your school or school authority plan. Your mission, mandate, values and beliefs, and long-range goals all provide a context for setting specific targets. Similarly, past achievement levels are helpful indicators of what specific targets may be most appropriate. This is why achievement test and diploma examination results, as well as results of various other local assessments, are relevant in target setting.

### Local Focus

Quantitative targets for student achievement on the provincial achievement tests and diploma examinations are **required** in private school education plans.

Systematic interpretation of school results from provincial achievement tests and diploma examinations will reveal where students need more help in order to continue learning successfully. This can be the beginning point for setting targets for student performance on the tests for the next year or two.

Targets should be realistic and achievable, based on past performance. It is possible that local targets would be different from provincial standards. Staff in each school will be able to identify what percentage of their students reasonably can be expected to achieve the provincial standard in a particular test or examination within the time specified in the targets. An important part of this decision is agreeing on how financial and human resources can support the targets.

**Tips for Setting Local Targets**

- Consider past and desired participation rates in achievement tests and diploma examinations.
- Prioritize to focus on areas needing improvement. For example, emphasize subjects needing improvement in student performance are across grades. It may be reasonable to set "hold the line" targets to maintain current levels of performance in other areas temporarily while directing attention to the selected areas.
- Set targets in relation to other targets. It is important to ensure that achievement of one target does not jeopardize the achievement of another. For example, student participation rates for achievement tests and diploma examinations should not decrease because of a desire to improve results.
- Work collaboratively across grades in a school. Students' performance on an achievement test or diploma examination reflects their learning over the years. Teachers in all grades can contribute important insights and assistance in setting targets.
- Use the school reports on achievement test or diploma examination results to identify what aspects of a subject or course need attention, and use this information to plan targets.
- Emphasize what students need in order to succeed, rather than focusing on problems that keep students from achieving at the levels expected provincially.
- Expect to set different targets in different grades and subjects/courses, depending on past results and current priorities and resources.
- Work collaboratively at the authority level, to identify areas of common strength or areas for improvement across different schools and to determine targets for the authority that can encourage all schools (if applicable).
- Interpret targets to students and parents so that they are part of the school-wide effort to achieve targets.
- Report to students and parents on student achievement in relation to targets.

**Targets in Perspective**

Provincial tests, though providing a common standard and important information about students' learning, are only one of many measures for evaluating the effectiveness of schools and school authorities.

Private school authorities may find it helpful to set targets for other indicators of student achievement, and for areas other than student achievement.

Examples include:

- completion of programs
- satisfaction reported by students or parents
- involvement of parents or others from the community in schools
- student involvement in the community or in extra curricular activities.

These other targets can either be quantitative (e.g., "by 2003, 80% of students") or qualitative (e.g., "improve..." or "maintain...").

Through its targets, each private school, together with parents and members of the community, can highlight priorities for a given year or the plan period and commit to achieving certain results.

Insofar as target setting complements other strategies for improving student learning, school and authority targets are likely to contribute to student learning and to the overall effectiveness of schooling in your community.

## Appendix 6
## Conducting Surveys

Some local measures may require surveys of parents, students, staff and other community members.

To be manageable, surveys can be done on a random sampling basis or rotated among stakeholder groups over a three-year period.

If school authorities use the same questions as are used in Alberta Learning's annual surveys of a stratified random sample of parents, students and the public, results can be considered in relation to provincial results. The questions asked in the Ministry's surveys of students, parents and the public are available on the Internet at http://www.learning.gov.ab.ca/educationsystem/satisfaction/default.asp

While surveys do not have to be done annually, the latest available survey information should be reported in the AERR each year along with trend data (information on the same questions from surveys done in previous years), if available.

The Alberta Auditor General's Office has prepared a resource on conducting surveys: *Client Satisfaction Surveys*, October 1998. This document is available on the Internet at http://www.oag.ab.ca/pd.clientsatisfaction.pdf.

Two resources were prepared for the Ministry in 1995 to provide guidance to school authorities on conducting satisfaction surveys:

- Environics West, *Pilot Project Report:* This report compares two methods of conducting surveys of parents, teachers and students: telephone interviews and mailed, self-administered questionnaires (http://www.learning.gov.ab.ca./educationsystem/satisfaction/PilotProjectReport.pdf).

- Environics West, *Telephone and Self-Completed Satisfaction Surveys: Training Manual:* This manual provides advice on selecting samples and conducting telephone and mailed surveys (http://www.learning.gov.ab.ca/educationsystem/satisfaction/interviewing_Manual.pdf).